



Creating Board Records in AMIS

Office of Certification Policy and Evaluation (OCPE)

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

www.cdfifund.gov

Resources



- Full guidance on Organization Board Records found under Step 2: Apply at www.cdfifund.gov/cdficert.

Use of Board Records



- An Applicant or Certified CDFI can create up to 2 board records to demonstrate accountability to its proposed CDFI Certification markets.
- CDFI Certification Market Records are used to demonstrate compliance for
 - Entities seeking to obtain or maintain CDFI Certification
 - Entities seeking to obtain or maintain the Native American CDFI designation
 - Entities relevant to the CDFI Certification collective review

Presentation Structure



Creating a New Board Record



Creating Board Member Records



Changing Board Status for Submission

Presentation Structure

A decorative graphic on the left side of the slide, consisting of a central yellow circle connected by a yellow line to two smaller yellow circles above and below it, all set against a dark blue background.

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Presentation Structure

A yellow graphic element consisting of a curved line that starts at the top left, passes through two empty yellow circles, and ends at a solid yellow circle at the bottom left. The line continues downwards from the solid circle.

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